Job Aid:

How to Score and Award a Bid in COMMBUYS

This Job Aid shows how to:

- How to score and award a bid using the bid tabulation function

Of Special Note:

The bid tabulation function in COMMBUYS is used to score and review vendor responses to bids, called **quotes** in the system. The entire process--bid, quotes, scoring guidelines, etc.-- is viewable in COMMBUYS, which offers users the benefit of concise document management as well as an organized electronic procurement file. If bid tabulation is not used to score a Bid, this information can be entered on a spreadsheet (or as follows current practice) and posted as an attachment on the Attachments tab.

Screenshot	Directions
	1. Launch the COMMBUYS website: https://www.commbuys.com/bso/ Enter your login credentials and click the **Login** button on the COMMBUYS home page.

OSD
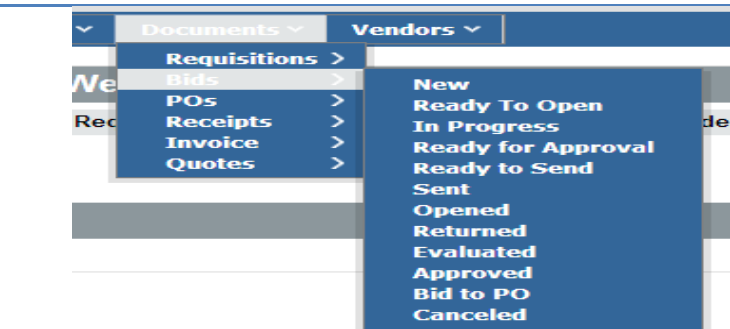## OPERATIONAL SERVICES DIVISION

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Screenshot	Directions
	2. Upon successful login, if assigned multiple roles select the **Basic Purchasing** role tab on the upper right side of the page.
	3. From the Navigation bar, under **Documents,** select **Bids > Ready to Open**. Click on the appropriate blue **Open Bid** hyperlink to open and review the bid.
	4. The Bid opens to the Summary tab. Scroll to the bottom of the page and click **Bid Tab**.

Screenshot	Directions
Bid Tabulation for Bid #BD-14-1080-1080C-1 — Total Number of Submitted Quotes: 10	5. The Bid Tabulation page opens displaying the list of all quotes submitted by registered COMMBUYS vendors for the selected bid.

If your procurement is a small procurement, ($150,000 or less), you must identify SBPP-active vendors. In order to identify whether vendors submitting quotes are SBPP-active you will need to run an administrative report.

Follow step 6 – 12 to run a report for SBPP Vendors.

If your procurement is over $150,000, skip to step 13. |

Bid Tabulation for Bid #BD-14-1080-1080C-1

Tabs: Quotes | Revisions | Items | Header Questions | Subcontractors | Routing | Attachments | Score | Summary | Back to

Total Number of Submitted Quotes: 10

Quote #	Description	Vendor ID	Vendor Name
QT-1080-OSD01-OSD10-00000000066	Bid for Vendor 2	00002137	TOMVendor9
QT-1080-OSD01-OSD10-00000000069	Bid for Vendor	00000267	Barker Steel LLC / Harris Rebar
QT-1080-OSD01-OSD10-00000000070	Bid for Vendor	300125	B & B Engineering
QT-1080-OSD01-OSD10-00000000073	Bid for Vendor	235372	Bank of America
QT-1080-OSD01-OSD10-00000000074	Bid for Vendor	204994	Bacher Corporation
QT-1080-OSD01-OSD10-00000000075	Bid for Vendor	00001174	K and M Communications
QT-1080-OSD01-OSD10-00000000076	Bid for Vendor	00000175	E Alves Cleaning Service
QT-1080-OSD01-OSD10-00000000078	Bid for Vendor	00000998	J & E Mechanical Corp
QT-1080-OSD01-OSD10-00000000079	Bid for Vendor	222929	Jack Young Company, Inc
QT-1080-OSD01-OSD10-00000000111	Bid for Vendor	00002196	TOMVendor21

November 20, 2014 10:10:07 AM EST — Contract Officer	6. Click on the blue and orange pie icon in the top right corner of the screen to open Administrative Reports.

Administrative Reports — Other — Report File Name: Bidder SBPP Status, By Bid Number; Custom Columns in PO; Overview of Contracts; SBPP Active Vendors — Exit	7. Click on the link for **Bidder SBPP Status, By Bid Number.**

Job Aid:
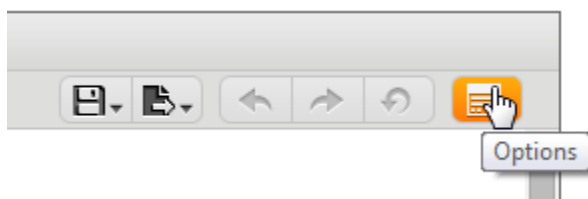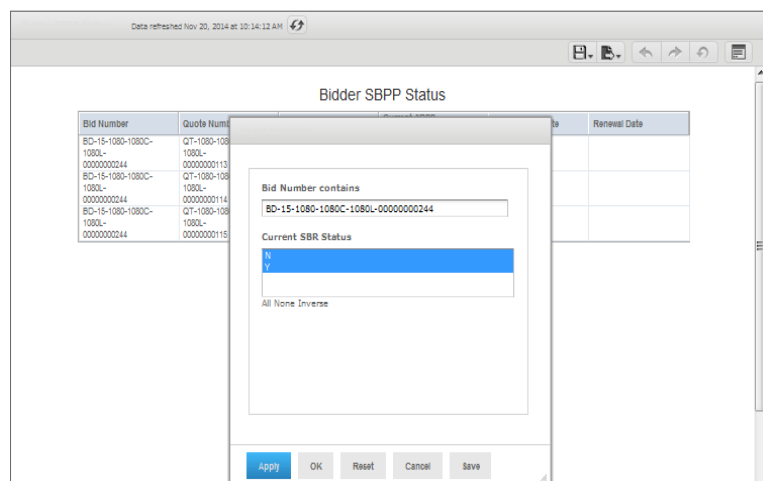### How to Score and Award a Bid in COMMBUYS

Screenshot	Directions
	8. A report opens in a new webpage window/tab labled Buisiness Intelligence Administration. The report title is Bidder SBPP Status.

Under SBPP Status, a **Y** designates those Vendors who are SBPP Active, while an **N** denotes those Vendors who are not. |
| | 9. Click on the option icon in the top right corner of the report page. This option icon will allow you to filter by the Bid Number, bringing up only those Vendors who submitted quotes for the Bid you are working on. |
| | 10. Insert the Bid number in the first field.

Click OK to narrow report results to only the quotes for the Bid. |
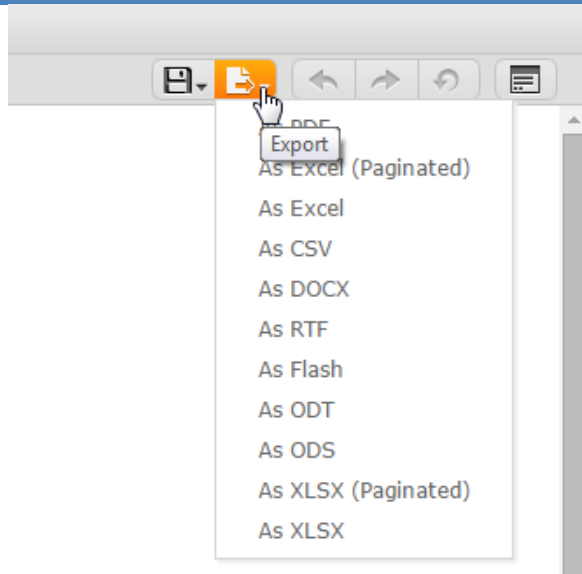
Screenshot	Directions
	11. From the filtered results you have the option to export this report for your procurement record. Click on the Export icon and choose from the availabel document options.
	12. In this example, the entire SBPP status report was exported to an excel file. This excel file can be filtered, sorted, and saved in order to assist you in your procurement decisions and keep for your procurement records.

Screenshot	Directions

13. To begin the scoring and evaluation process, click the **Score** tab. The **Scorecard** is an assessment tool used to evaluate quotes in COMMBUYS. Scoring criteria is based on a weighting system of a 100% total. Each criterion will have an importance value (or "weight") assigned as a percent. The total of all criteria combined must equal 100%. The scores against those weights are recorded numerically 1 to 99.

After criteria input, the purchaser forwards a request to a group of approvers who use those criteria to evaluate (score) the bid.

The Score Tab consists of three sub-tabs:

- **Maintain** – used to enter and display the criteria, criteria weights and select scorers
- **Score Entry** – used to enter and display individual vendor scores based on vendor quotes.
- **Score Summary** – displays a side by side view of all entered vendor scores

14. Enter each **Scoring Component Description** and assign each a Weight in the appropriate fields.

Click **Save & Continue** after adding each item until all items are added and the weight totals 100. If the total weight does not equal 100, a red error message will display.

Fields on the scoring component are:

- **Scoring Component Description** – criteria used for scoring
- **Weight** – importance of criteria, measured by percentage
- **Scorer Name** – organization user(s) designated as scorer(s) for the bid

Check the boxes that are applicable for your Bid evaluation:

- Hide Pricing
- Display Scoring Summary
- Display Scoring Detail

Screenshot	Directions
ERROR • Scorer is required. **Scorecard Creation/Maintenance** Scoring Component Description / Weight / Delete Price — 35.0 Delivery Time — 25.0 quality — 40.0 — 0.0 total: 100.0 subTotal: 100.0 ☐ Hide pricing from scorers ☑ Display scoring summary to scorers ☑ Display scoring detail to scorers **Scorer Creation/Maintenance** ScorerName / Delete	15. When the **Scoring Component Description** is complete, the error message "*total weight not equal to 100*" no longer displays. The "Scorer is required" message remains until at least one scorer is selected and saved. To designate your organization's users who will score the quotes, select users, one at a time, from the Scorer Name dropdown menu.
Bid Tabulation for Bid #00000127 Quotes Revisions Items Header Questions Subcontractors Routing Attachments **Score** Summ **Maintain** ScoreEntry Score **Scorecard Creation/Maintenance** Scoring Component Description / Weight / Delete Price — 35.0 Delivery Time — 25.0 quality — 40.0 — 0.0 total: 100.0 subTotal: 100.0 ☐ Hide pricing from scorers ☑ Display scoring summary to scorers ☑ Display scoring detail to scorers **Scorer Creation/Maintenance** ScorerName / Delete Banks-Grant, Linda	16. Select a scorer name then click **Save & Continue.** An additional dropdown selection box will display directly below the saved scorer. Repeat the above step for any additional scorers. Click the **Quotes** tab to review the bids prior to Score Entry.
Bid Tabulation for Bid #00000127 Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score Summary Back to Bid Total Number of Submitted Quotes: 2 	Quote #	Description	Vendor ID	Vendor Name
---	---	---	---
00000127	test approval	00000081	Isle of Skye, LTD
00000128	test approval	00000006	Wiki's Widgets		17. You can review each quote by clicking on the blue **Quote #** hyperlink to open each vendor quote.

Screenshot	Directions
	18. The quote opens in a new window to the **Summary** tab, a format similar to every document in COMMBUYS. All vendor quote information is stored in the displayed tabs. Review all information in all tabs (including any submitted attachments) to evaluate the vendor quote. Next, click the **Score** tab and then the **Score Entry** sub-tab.
	19. The **Score Entry** sub-tab is where the actual score for each vendor is entered. To start the process, use the dropdown to select a vendor.
	20. The score card refreshes showing the weighted categories for the selected vendor. Enter the Raw Score and any notes. Click **Save & Continue** to save the score. Repeat the process (Steps 10-13) until all vendor quotes have been scored. Click the **Score Summary** tab.

Screenshot	Directions

21. The **Score Summary tab** displays the weighted scores side by side for easy review.

22. Click the **Items** tab to view and make the award.

NOTE: For small procurements (those less than or equal to $150,000) refer to the SBPP Policy on www.mass.gov/SBPP on the **SBPP Resources for Executive Department Purchasers** page.

23. To award all lines of the bid to a single vendor, click the **Award All** button in the correct Vendor's column.

To award a multi-line bid to different vendors, check the box on each line under the vendor who will receive the award.

After the award decisions are complete, click **Save & Continue**.

24. Click the **Summary tab** to view the vendor(s) that have been award the contract.

Click **Submit for Approval**.

Screenshot	Directions
Bid Status: 2BA - Bid Approved (Ready for Vendor Awarding) Item info/Quote info Electric stuff Item #:1 Print Sequence:1.0 Status:2BA - Approved Quantity:1.0 Uom:EA Totals: $Vendor Gross Total: $ Vendor Discount: $ Vendor Net Total: $ Preference Discount: $ Evaluation Total: $ Vendor Freight: $ Awarded: Eval Codes: Pref Codes: [Create PO] [Print] Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	25. Once the evaluated bid has been approved, it will be in **2BA – Bid Approved** status. Go to the summary screen of the Bid Tabulation and click **Create PO** at the bottom of the page.
Bid 00000017 - Purchase Order Creation Preview 1 purchase order will be created for the following quote: Quote # 00000014	Vendor ID 00000012	Vendor Name Alyssa Test Purchase order creation options: ☑ Include Narrative Items ☑ Include Bid Attachments ☑ Include Bid Tab Attachments ☑ Include Bid Notes ☑ Include Quote Subcontractors ☑ Include Vendor Quote Attachments ☑ Include Forms ⓘ Click 'Continue' button to create PO or click 'Cancel & Exit' button to cancel the PO creation and return to the bid tabulation summary page. [Continue] [Cancel & Exit] Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	26. Click **Continue** to generate a Master Blanket Purchase Order from all the information listed in the Bid and Bid Tabulation. Any of the pre-checked boxes can be deselected; however that information will then need to be filled in manually.
Blanket Bid 00000017 - Purchase Order(s) Created The following Purchase Order(s) were created: 	PO #	Vendor ID	Vendor Name	Total
0000051	00000012	Alyssa Test	$5.00 | [OK] Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	27. A new Purchase Order # is generated. To open and edit and/or submit the Master Blanket, click the hyperlink **PO #**. Note: The PO is created and will be marked *In-Progress* if you wish to return to COMMBUYS at a later date.
[Submit for Approval] [Clone PO] [Print] [Print Vendor Copy] Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	28. The PO will open to the **Summary tab**. The PO is In-Progress and therefore edits can be made if required. Click **Submit for Approval** once ready to finalize the Master Blanket.

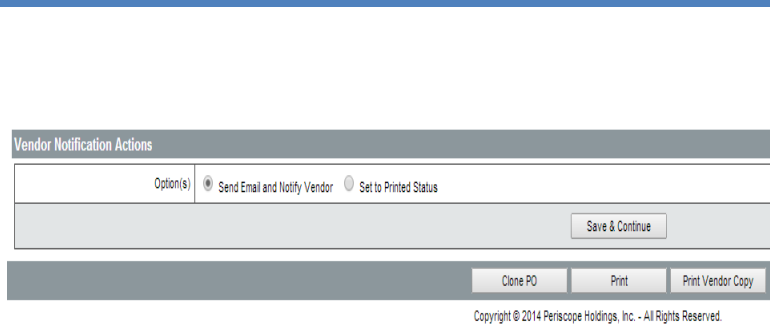| Screenshot	Directions
	29. Once the Master Blanket PO has gone through the appropriate approval path it is in a **Ready to Send** status. The PO will open to the **Summary Tab**. At the bottom of the page, select from one of the two options: • Send Email and Notify Vendor • Set to Printed Status (still posts the purchase order on COMMBUYS but does not send any vendor emails) Click **Save and Continue** to finalize the purchase order and place the order.